

**DEATH**

**WITHOUT**

**DEADNAMES**

**PROTECTING ALL LGBTQIA+ IDENTITIES IN DEATH**

## OF GREETINGS AND GOODBYES

Most people don't like to think about what will happen when they're gone, so we avoid discussing end of life matters or put off getting our affairs in order. But when we pass, this often leaves our family and friends with confusion and many unanswered questions during a very emotional time. This planning guide will include information you and your loved ones need to make funeral arrangements that will hopefully bring peace of mind, avoid extra expenses, and ease undue anxiety.

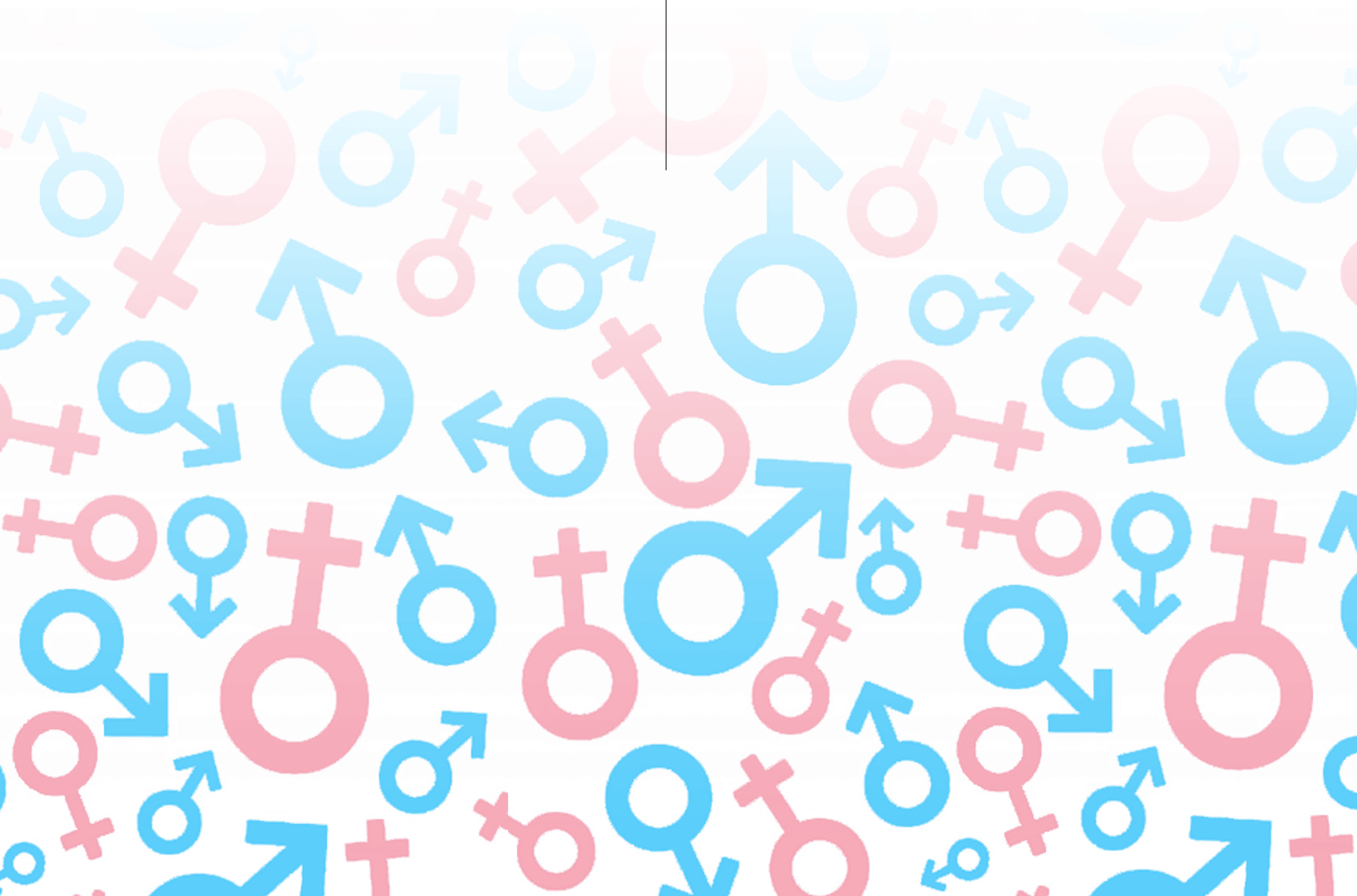
The first part of the booklet is a place for you to keep your important thoughts and feelings around what will happen with your body after you die, and what kind of funeral service you think could bring comfort to those whom you love. You can put all these things down here to help ease the burden on your loved ones when the time comes by ensuring that your wishes are clearly communicated and in one convenient place.

The second part of this booklet includes a variety of helpful resources, as well as related topics to consider. You can also find the form-fillable and always up-to-date digital version of this packet at <https://actualmortician.com>



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# When a death occurs, loved ones are faced with **88 Decisions** that must be made within hours.

## Do your loved ones know what you would want?

### Secure Vital Statistics (Required for burial permit)

- \*1. \_\_\_\_\_ Name, home address and telephone number
- \*2. \_\_\_\_\_ How long in state
- \*3. \_\_\_\_\_ Name of business, address and telephone number
- \*4. \_\_\_\_\_ Occupation and title
- \*5. \_\_\_\_\_ Social Security number
- \*6. \_\_\_\_\_ War Veterans Serial number
- \*7. \_\_\_\_\_ Date of Birth
- \*8. \_\_\_\_\_ Place of Birth
- \*9. \_\_\_\_\_ Citizenship
- \*10. \_\_\_\_\_ Father's name
- \*11. \_\_\_\_\_ Father's birthplace
- \*12. \_\_\_\_\_ Mother's maiden name
- \*13. \_\_\_\_\_ Mother's birthplace
- \*14. \_\_\_\_\_ Religious name (if any)

### Pay Some or All of the Following

- \*15. \_\_\_\_\_ Family burial estate
- \*16. \_\_\_\_\_ Memorials
- \*17. \_\_\_\_\_ Funeral home
- \*18. \_\_\_\_\_ Interment service
- 19. \_\_\_\_\_ Clergy
- 20. \_\_\_\_\_ Florist
- 21. \_\_\_\_\_ Clothing
- 22. \_\_\_\_\_ Transportation
- 23. \_\_\_\_\_ Telephone bill
- 24. \_\_\_\_\_ Food
- 25. \_\_\_\_\_ Doctors' bills
- 26. \_\_\_\_\_ Home healthcare bills
- 27. \_\_\_\_\_ Hospital and ambulance bills
- 28. \_\_\_\_\_ Medicine and drug bills
- ^29. \_\_\_\_\_ Other current and urgent bills  
(mortgage or rent, taxes, installment payments)

### Collect Documents (Required to establish rights for insurance, pensions, social security, ownership, relationship, etc.)

- \*30. \_\_\_\_\_ Will
- \*31. \_\_\_\_\_ Legal proof of age or birth certificate
- \*32. \_\_\_\_\_ Social Security card or number
- \*33. \_\_\_\_\_ Marriage license
- \*34. \_\_\_\_\_ Citizenship papers
- \*35. \_\_\_\_\_ Insurance policies  
(life, health and accident, property)
- \*36. \_\_\_\_\_ Bank books
- \*37. \_\_\_\_\_ Deeds to property
- \*38. \_\_\_\_\_ Bill of sale of car
- \*39. \_\_\_\_\_ Income tax returns, receipts or canceled checks
- \*40. \_\_\_\_\_ Veterans discharge certificate
- \*41. \_\_\_\_\_ Disability claims
- \*42. \_\_\_\_\_ Cemetery Certificate of Ownership

### Decisions and Arrangements

- \*43. \_\_\_\_\_ Select funeral home
- \*44. \_\_\_\_\_ Choose funeral service and burial/cremation options
- \*45. \_\_\_\_\_ Select burial estate location and which space to open
- \*46. \_\_\_\_\_ Choose memorial type and inscription
- \*47. \_\_\_\_\_ Select casket and/or urn type
- \*48. \_\_\_\_\_ Select clothing for deceased
- \*49. \_\_\_\_\_ Choose vault or sectional crypt
- \*50. \_\_\_\_\_ Select type of service (religious, military, fraternal)
- \*51. \_\_\_\_\_ Choose special selection from scriptures
- \*52. \_\_\_\_\_ Select clergy to officiate
- \*53. \_\_\_\_\_ Select place where service is to be held
- 54. \_\_\_\_\_ Select time for funeral service
- \*55. \_\_\_\_\_ Decide charitable organization to which donations are suggested in memory of deceased
- 56. \_\_\_\_\_ Provide information for eulogy
- \*57. \_\_\_\_\_ Select pallbearers
- 58. \_\_\_\_\_ Select flowers
- \*59. \_\_\_\_\_ Select music
- 60. \_\_\_\_\_ Choose clothing for family
- 61. \_\_\_\_\_ Prepare at home, including food for family and guests
- 62. \_\_\_\_\_ Obtain extra chairs
- 63. \_\_\_\_\_ Arrange transportation for family and guests, including planning funeral car list
- 64. \_\_\_\_\_ Check and sign necessary papers for burial permit
- \*65. \_\_\_\_\_ Provide vital statistics about deceased to funeral home
- \*66. \_\_\_\_\_ Provide addresses and telephone numbers for relatives and friends
- 67. \_\_\_\_\_ Answer innumerable sympathetic phone calls, messages, cards and letters
- 68. \_\_\_\_\_ Meet and talk with funeral director, cemetery representative and clergy
- 69. \_\_\_\_\_ Greet all friends and relatives who call
- 70. \_\_\_\_\_ Arrange for meeting relatives who arrive from out-of-town at airport
- 71. \_\_\_\_\_ Provide lodging for out-of-town relatives and friends
- 72. \_\_\_\_\_ Make list of callers and floral tributes sent for mailing cards of thanks
- \*73. \_\_\_\_\_ Arrange for special religious services
- \*74. \_\_\_\_\_ Check will regarding special wishes
- 75. \_\_\_\_\_ Order death certificate
- 76. \_\_\_\_\_ Look after children

### Notify As Soon As Possible

- 77. \_\_\_\_\_ Doctor or doctors
- 78. \_\_\_\_\_ Funeral home
- 79. \_\_\_\_\_ Cemetery
- 80. \_\_\_\_\_ All relatives
- 81. \_\_\_\_\_ All friends
- 82. \_\_\_\_\_ Employer of deceased
- 83. \_\_\_\_\_ Employers of family members missing work
- 84. \_\_\_\_\_ Pallbearers
- 85. \_\_\_\_\_ Insurance agents (life, health and accident)
- 86. \_\_\_\_\_ Religious, fraternal, civic, veterans organizations, unions and deceased's social media accounts
- 87. \_\_\_\_\_ Newspapers regarding notices
- 88. \_\_\_\_\_ Attorney, accountant or executor of estate

\*Indicates the 48 decisions that can be planned or paid *ahead of time*.

^Indicates current obligations that continue until accounts are closed.

## GETTING STARTED

Arranging your services in advance creates a records of your carefully considered choices, providing you and your loved ones with peace of mind.

### 1. REFLECT

- How do you want to be remembered?
- What should your service say about your life?
- Do you wish to be buried or cremated?



### 2. RECORD

- Eliminate guesswork for your family.
- Use your planning guide to records your wishes and important personal information in one safe space.

### 3. SELECT

- Select services and merchandise.
- Choose a funding option.
- Convenient payment terms.
- Eases the financial burden.



### 4. SHARE

- Inform your loved ones of your wishes.
- Keep copies of your planning document in a filing cabinet or in-home safe.
- Let your loved ones know where the documents are.

# Social Security

My Social Security Number: \_\_\_\_\_

Social Security should be contacted as soon as possible after a person's death. Typically the funeral home will report the death to Social Security.

A one-time lump sum death payment of \$255 can be paid to a spouse or child if they meet certain requirements. Survivors must apply for this payment within two years of the date of death.

Certain family members may be eligible to receive monthly benefits.

- A widow or widower age 60 or older (age 50 or older if disabled)
- A divorced widow or widower \*
- Unmarried children \*
- A stepchild, grandchild, stepgrandchild or adopted child \*
- Dependent parents age 62 or older \*

\* *Under certain circumstances*

The amount of a survivor's benefit is based on several factors, most importantly the age at which the deceased began drawing social security.

Contact Information:  
Social Security Administration  
1-800-772-1213  
[www.socialsecurity.gov](http://www.socialsecurity.gov)



# Military History

Branch of Service: \_\_\_\_\_

Serial Number: \_\_\_\_\_

Highest Rank/Grade/Rating: \_\_\_\_\_

Date Entered: \_\_\_\_\_ Place: \_\_\_\_\_

Date Discharged: \_\_\_\_\_ Place: \_\_\_\_\_

Where to find discharge documents (DD214): \_\_\_\_\_

Where to find military retirement papers: \_\_\_\_\_

Conflicts & Wars Served: \_\_\_\_\_

Medals & Honors: \_\_\_\_\_

## Veteran's Burial Benefits

VA burial allowances are flat-rate monetary benefits that help cover an eligible Veteran's burial and funeral costs. When the cause of death is not service related, the payments include a burial allowance and a plot or interment allowance. A claim for these allowances must be filed within 2 years after the Veteran's burial or cremation.

Veterans and family members may qualify for a gravesite in a VA national cemetery. Burial benefits provided at no cost include opening and closing of the grave, a government headstone or marker and perpetual (ongoing) care of the gravesite.

Memorial Items:

- A burial flag and Presidential Memorial Certificate can be requested for eligible Veterans.
- A headstone, grave marker or niche cover can be requested to identify the burial place of a Veteran. Eligible family members buried in a national cemetery or certain other Veterans or military cemeteries, may also qualify for this.
- A medallion for an eligible Veteran can be requested to be placed on a privately purchased headstone or marker. You can plan ahead for burial in a VA national cemetery by applying for pre-need eligibility determination.

Contact information:  
U.S. Department of Veterans Affairs / Veterans Benefits Administration  
1-800-827-1000 / [www.va.gov](http://www.va.gov)

# Vital Statistics

Preferred Name: \_\_\_\_\_

Legal Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Gender:  Female  Male  Non-binary Race: \_\_\_\_\_

Place of Birth: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Veteran:  Yes  No

Marital Status:  Married  Never Married  Widowed  Divorced

Name of Surviving Spouse: \_\_\_\_\_

Occupation: \_\_\_\_\_

Business/Industry: \_\_\_\_\_

Employer: \_\_\_\_\_ Retired:  Yes  No

High School Attended: \_\_\_\_\_

City, State: \_\_\_\_\_ Year of Graduation: \_\_\_\_\_

College Attended: \_\_\_\_\_

City, State: \_\_\_\_\_ Year of Graduation: \_\_\_\_\_

Degree(s) Received: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Place of Birth: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

(Maiden)

Place of Birth: \_\_\_\_\_



# Will

Do you have a will?  Yes  No Date: \_\_\_\_\_

Physical Location: \_\_\_\_\_

Executor: \_\_\_\_\_ Phone: \_\_\_\_\_

Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_

Do you have a living will?  Yes  No Date: \_\_\_\_\_

Physical Location: \_\_\_\_\_

Do you have a holographic (handwritten but not witnessed or notarized) will?

Yes  No Date: \_\_\_\_\_

Physical Location: \_\_\_\_\_

Do you have a POA?  Yes  No Date: \_\_\_\_\_

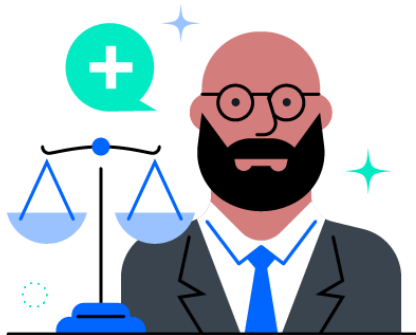
Physical Location: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

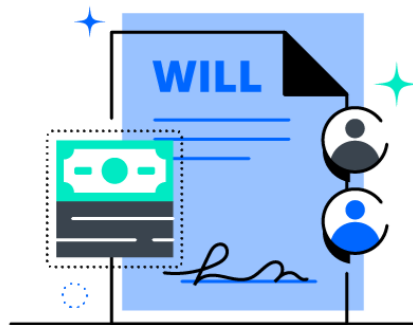
Do you have a DNR?  Yes  No Date: \_\_\_\_\_

Physical Location: \_\_\_\_\_

## Types of *advance directives* include:



**Medical power of attorney (POA)**



**Living wills**



**Do not resuscitate (DNR) orders**

# Estate

## Bank Information

Bank: \_\_\_\_\_ Checking #: \_\_\_\_\_ Savings #: \_\_\_\_\_

Bank: \_\_\_\_\_ Checking #: \_\_\_\_\_ Savings #: \_\_\_\_\_

Bank: \_\_\_\_\_ Checking #: \_\_\_\_\_ Savings #: \_\_\_\_\_

## Credit Cards

Type: \_\_\_\_\_ Card #: \_\_\_\_\_ Expiration: \_\_\_\_\_

Type: \_\_\_\_\_ Card #: \_\_\_\_\_ Expiration: \_\_\_\_\_

Type: \_\_\_\_\_ Card #: \_\_\_\_\_ Expiration: \_\_\_\_\_

## Life Insurance Policies

Type:  Term  Whole Life  Universal  Group  Other: \_\_\_\_\_

Location\*: \_\_\_\_\_

Company: \_\_\_\_\_ Policy #: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Type:  Term  Whole Life  Universal  Group  Other: \_\_\_\_\_

Location\*: \_\_\_\_\_

Company: \_\_\_\_\_ Policy #: \_\_\_\_\_ Beneficiary: \_\_\_\_\_

## Retirement Accounts, Mutual Funds, Stocks, Bonds, Etc.

Type: \_\_\_\_\_ Location\*: \_\_\_\_\_

Company: \_\_\_\_\_ Agent/Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Type: \_\_\_\_\_ Location\*: \_\_\_\_\_

Company: \_\_\_\_\_ Agent/Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

\* *Physical Location*



**Real Estate Owned**

Description: \_\_\_\_\_

Address: \_\_\_\_\_

Mortgagee: \_\_\_\_\_

Description: \_\_\_\_\_

Address: \_\_\_\_\_

Mortgagee: \_\_\_\_\_

Description: \_\_\_\_\_

Address: \_\_\_\_\_

Mortgagee: \_\_\_\_\_

**Bequests/Personal Gifts**

Items:

Beneficiary:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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\_\_\_\_\_



# Medical Information

It is very important that your family has an up-to-date record of your medical history in case of an emergency that renders you unable to assist the doctors treating you. Also your children and grandchildren will need this information for their doctor's medical history of them.

Primary Care Doctor: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Drug allergies: \_\_\_\_\_

Other allergies: \_\_\_\_\_

Organ donor:  Yes  No Exceptions: \_\_\_\_\_

Treatment History:  Cancer  Tuberculins  Kidney Disorder  Diabetes

Circulatory problems  Heart  Other: \_\_\_\_\_

Do you or other family members have stem cells stored at a cord blood bank?  Yes  No

Storage Bank Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Do you have Travel/ "Away From Home" Protection?  Yes  No

Name of Plan \_\_\_\_\_ Contract #: \_\_\_\_\_

Participant: \_\_\_\_\_ Location of Plan: \_\_\_\_\_

Name of Receiving Funeral Home: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_



# Cemetery & Memorialization Information

**Preferred Cemetery:** \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_

**Traditional Burial Space:**     Own     Prefer

If own: Section: \_\_\_\_\_ Lot #: \_\_\_\_\_ Space #: \_\_\_\_\_

Type of Arrangements:     Family Estate     Companion     Single

Type of Burial Rights:     Mausoleum     Lawn Crypt     Ground Burial

Cremation with Memorialization

If owned, name of person who interment rights are deeded to: \_\_\_\_\_

Legal Description of Interment Rights: \_\_\_\_\_

Location of Deed: \_\_\_\_\_

**Cremation Disposition:**     Burial     Mausoleum     Scattering Garden

Cremation Garden     Niche     Other: \_\_\_\_\_

Memorial Plaque Inscription: \_\_\_\_\_

Cremated Remains Container:     Urn     Keepsake Memorial     Other: \_\_\_\_\_

Description: \_\_\_\_\_

**Permanent Memorialization:**     Own     Prefer

Type:     Upright Monument     Marker     Memorial     Other: \_\_\_\_\_

Inscription: \_\_\_\_\_ Emblem(s): \_\_\_\_\_

Accomplishments: \_\_\_\_\_

Family present during closing of property?     Yes     No

Opening and closing of property?     Prepaid     To Be Determined

Additional Remarks/Special Instructions/Items to be placed with the remains, etc.

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# Funeral Service Information

Burial       Funeral Ceremony Followed By Cremation

Memorial Ceremony Following Cremation       Direct Cremation

Preferred Funeral Home: \_\_\_\_\_

City/State: \_\_\_\_\_ Phone: \_\_\_\_\_

Place of Service:  Funeral Home     Cemetery     Home

Other: \_\_\_\_\_

Religious Preference: \_\_\_\_\_ Celebrant: \_\_\_\_\_

Participating Organizations (military, fraternal, lodge, etc.):

\_\_\_\_\_

Flag:  Draped     Folded    Presented to: \_\_\_\_\_

Wake/Rosary Service:  Yes     No    Location: \_\_\_\_\_    Officiant: \_\_\_\_\_

Viewing:  Public     Private     None

Clothing Preference:  From Current Wardrobe     New     Other: \_\_\_\_\_

Description/Color: \_\_\_\_\_

Personal Accessories:

Jewelry Description: \_\_\_\_\_

Stays on     Return to: \_\_\_\_\_

Eyeglasses: \_\_\_\_\_

Stays on     Return to: \_\_\_\_\_

Other Description: \_\_\_\_\_

Stays on     Return to: \_\_\_\_\_

Pallbearers: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Floral Preference (type and color): \_\_\_\_\_

Memorial Donations may be made to: \_\_\_\_\_

Organist: \_\_\_\_\_ Soloist(s): \_\_\_\_\_

Musical Selections: \_\_\_\_\_

Poem or Reading: \_\_\_\_\_

Eulogy by: \_\_\_\_\_

Notes for Eulogy: \_\_\_\_\_

Newspaper Notices: \_\_\_\_\_

Casket:  Open during service  Closed during service

Type of casket:  Hardwood  Metal  Cremation  Earth Friendly

Other: \_\_\_\_\_

Description: \_\_\_\_\_

Urn:  Metal  Marble  Cloisonné  Scattering  Earth Friendly

Services and merchandise noted are prepaid and contracts/policies can be located at:

Additional Information/Special Instructions: \_\_\_\_\_

# My Story & Legacy

The sharing of important memories, happy moments and proud accomplishments along our life journey will help family and friends to focus on our life instead of our death. This can be very positive and healing for all, so please share as much as you can and use extra pages as necessary. This format is only a guide to help you organize.

Birth Date and Time: \_\_\_\_\_ Hospital: \_\_\_\_\_ Location: \_\_\_\_\_

Birth Story: \_\_\_\_\_

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Early Childhood Memories: \_\_\_\_\_

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Elementary/Middle School (teachers, friends, favorite activities, likes and dislikes): \_\_\_\_\_

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High School (teachers, friends, favorite activities, likes and dislikes): \_\_\_\_\_

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College/Tech School/Grad School: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Post College: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Career: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Family: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Friends: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# My Story & Legacy

Faith: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Civic: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Proudest Moments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# People to Contact

Please list the significant people in your life that the funeral home should reach out to upon your death.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_



# END OF LIFE PLANNING CHECKLIST

## **FIRST & FOREMOST**

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Complete your Agent Form, and Burial or Cremation Goods and Services form (pg. 29, 30, 31). This means filling it out completely, having it signed and witnessed. Once completed, keep this in a safe place where you and your representative have easy access for when the time comes.

The following are information and places to access for other documents, services, and guides to the many aspects of end-of-life and funeral planning.

## **HEALTHCARE POWER OF ATTORNEY**

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The term health care power of attorney is used interchangeably with health care proxy, durable medical power of attorney, and surrogate decision-maker. This critical document is for anyone over the age of 18. The healthcare power of attorney allows you to name a trusted person to make healthcare decisions on your behalf when you are mentally incapacitated.

<https://www.health.ny.gov/publications/1430.pdf>

## **LIVING WILL/ADVANCED CARE DIRECTIVE**

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A living will is a legal document that tells others what your choices are about end-of-life medical treatment. A living will is sometimes included in the healthcare power of attorney documents, but if it is not, you can make sure to add it. It specifies procedures or medications you want—or don't want—to prolong your life if you can't speak for yourself. An example would be because you're under anesthesia or are unconscious from an accident or other medical event. Or, you have a cognitive impairment like Alzheimer's or dementia.

[Freewill.com/advance-healthcare-directive](http://Freewill.com/advance-healthcare-directive)

## **ORGAN AND TISSUE DONATION**

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Organ and tissue donation are different processes, and they are both very personal decisions to make. There is no waiting list for most tissue transplants, and the tissues are available when someone needs them. Donated organs have to be transplanted within hours of death, while tissue donations can be preserved and transplanted for up to five years. You can decide to do just one or both.

[Lifeconnection.org/organ-donation-facts](http://Lifeconnection.org/organ-donation-facts)

## **DURABLE FINANCIAL POWER OF ATTORNEY**

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When planning for end-of-life issues, most people want to make their own medical, legal, and financial decisions. For financial matters a durable financial power of attorney is the most important resource to have in your estate planning documents. It is a legal document that provides you current decision-making authority while ensuring the management of your financial affairs if you become incapacitated.

With a financial power of attorney, you authorize someone else to make your financial decisions or to handle specific financial matters for you. A durable power of attorney is one that may become effective immediately and that lasts for as long as you are incapacitated.

[Freewill.com/durable-financial-power-of-attorney](http://Freewill.com/durable-financial-power-of-attorney)

## **MEDICAL INFORMATION**

Medical information is sometimes forgotten in end-of-life planning. But having this information available to your designated power of attorney not only makes their job easier but also facilitates your wishes. Include current medications, insurance, healthcare provider's names, and contact information, and all diagnoses. Remember to update this information or request proxy access for your power of attorney for your online medical record.

## **WILL OR TRUST?**

It is important to note that power of attorney terminates when you die. So, if you want the agent of your power of attorney to continue to exercise financial authority over your estate after you die, then you should appoint your agent as the executor of your estate in your will. Planning for all of your end-of-life needs can seem overwhelming, and there is a legal document for almost every issue. However, there are two legal documents that every person should consider, regardless of their circumstances. These are a last will and testament (a will) and a living trust (a trust.)

**A will** is a legal document used to dispose of your property upon your death according to your wishes. In your will, you simply identify specific pieces of property that you wish to leave to other people (called beneficiaries) when you die. You also can name someone in your will to handle the administration of your estate after your death, known as an executor.

When you die, your executor makes sure that all of your property is administered according to your wishes. Your executor files your will with the probate court after your death, and the court authorizes the payment of all of your debts from your estate and the legal transfer of title to your property. Having a will is an effective way to ensure that your estate is administered according to your wishes.

[Freewill.com](https://www.freewill.com)

**A trust** is similar to a will in that it can dispose of property after you die. However, a trust can operate while you are alive and continue to operate after your death. It is also a private document where you name beneficiaries to receive assets that you own according to your terms. In your trust, you appoint a trustee to carry out your wishes. By disposing of property in a trust, you can remove property from your probate estate, thus avoiding some otherwise applicable taxes and the often lengthy probate process.

<https://eforms.com/download/2017/06/New-York-Revocable-Living-Trust-Form.pdf>

## **OBITUARY**

Writing your own obituary can be helpful for both you and your loved ones, as your obituary or death notice doesn't need to be written after death. This can have your basic information, accomplishments, and what you value the most. If you could tell your story, what would you say?

[Joincake.com/blog/how-to-write-an-obituary-for-yourself/](https://www.joincake.com/blog/how-to-write-an-obituary-for-yourself/)

## **ACCESSIBLE LOCATION OF DOCUMENTS**

When you die or are incapacitated, your legal and financial issues become your family's issues. If you prepare ahead of time, you can rely on your loved ones to handle your affairs, make your financial decisions, and settle your estate when it becomes necessary. To do this, your loved ones will need to know all the information available in the documents that have been discussed, such as:

- Insurance policies
- Power of attorney
- Living will
- Last will and testament
- Living trust

With all of these documents in place, your loved ones can easily carry out your wishes and settle your affairs in the way that fulfills your end-of-life plan. You can leave copies of these end-of-life legal documents with loved ones whom you trust to carry out your wishes.

## **CONTACT INFORMATION**

Similar to your end-of-life legal documents, you may want your loved ones to have the contact information for any external experts or professionals responsible for providing care and advice. Providing the contact information for these people can make it easy for your executor and other loved ones to help settle any debts on behalf of your estate. You may want them to have contact information for the following:

- Primary care doctor
- Attorney
- Estate planner
- Accountant
- Trustee of any trust
- Veterinarian of any pets

Sometimes, your loved ones will need additional information that is not readily available on paper or may need someone to help fill in the blanks. Make sure to keep this information handy for your loved ones in the event of your death or sudden incapacitation.

## **ASSETS AND DEBTS**

More and more assets are distributed through other avenues or resources called "will substitutes" or "non-probate devices." For example, it is not unusual for the value of your pension or retirement account to exceed the value of your home. As a result, you may want your loved ones handling your estate to have all relevant information about your pension plan, retirement account, bank accounts, trusts, any life insurance policies, or payable-on-death accounts.

In addition to distributing any assets you may own at your death, your loved ones also will need to satisfy any outstanding debts of your estate. This will include any credit card debts that you may have accumulated during your life. You should be sure your loved ones know what debts you have and how to contact your creditors to settle your debts.

## **DEPENDENTS**

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Planning for your own incapacity or death also means planning for your minor children or those who are legally dependent on you for care. If you should die or become unable to care for your children, chances are their other parent will gain custody. However, if another parent is not available to care for them, your children may not automatically go to the care of another relative. The court would decide who would serve the best interest of your children, which can include foster parents chosen by the state.

To avoid having your children placed in the care of the state, you should designate a legal guardian whom you want to care for your children under such circumstances. You can make this designation in your will.

Along with this designation, you should provide resources for the long-term care of your children. This can be accomplished in your will or through a trust, listing resources for their long-term care, as well as your overall estate planning goals for your children after your death.

<https://www.supremecourt.ohio.gov/forms/all-forms/guardianship/10>

## **COMPANION ANIMALS**

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There are several steps you can take to make sure your pets are properly cared for in the case of an emergency. Consider carrying an animal card in your wallet or purse, and also keep it displayed in your home. This is a small card notifying first responders that you have a pet that requires immediate care. The card should contain information about your pet, such as:

- The type of animal
- Your pet's name
- The location of your pet
- Contact information for someone who can gain access to your pet
- Special care instructions

You may also want to prepare a more extensive document that describes your long-term care plans for your pet, including a potential caretaker in your absence and information about financial resources to provide the degree of care that you prefer for your pet. Every state has laws that allow a court to enforce a pet trust, a document that describes the responsibilities of your pet's caretaker to provide for the pet and holds financial assets for providing the level of care that you describe in the document.

## **PHYSICAL MARKER**

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A physical marker is any real-life object that honors your memory. This can be a headstone, a memorial scrapbook, a memorial diamond, a tree planted in your honor, or a bench in your favorite park. Consider what's important to you and your family, and what would be useful or comforting over time.

[Partingstone.com](http://Partingstone.com)

[Soulbursts.com](http://Soulbursts.com)

[Legacytouch.com](http://Legacytouch.com)

[Beyondthewillowtree.com](http://Beyondthewillowtree.com)

[Shop.arboday.org/commemorative-trees-in-memory](http://Shop.arboday.org/commemorative-trees-in-memory)

[Loveliveson.com/watch-18-tips-on-buying-cemetery-headstones-monuments](http://Loveliveson.com/watch-18-tips-on-buying-cemetery-headstones-monuments)

## **DIGITAL LEGACY ITEMS**

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How do you want your accounts memorialized (if at all), and what happens to your digital files? Your digital legacy can be difficult for your family to manage, so consider how you'd like them to handle it.

**Make a Digital Inventory:** Get in the habit of creating a digital inventory regularly, this is a comprehensive list of accounts, profiles, and digital assets. Not only is this helpful for friends and family, but it's also a great way to check whether there are unused accounts you need to close.

**Email Accounts:** Your email account can be a personal thing, and you might wish for a trusted loved one to manage your account once you're no longer here. Whether you choose to have it deleted or left alone, make sure your family knows how to access this information.

**Digital Account Access:** Sharing access to your accounts without your passwords will make it difficult for your loved ones to protect your digital legacy. Most accounts can't be accessed by loved ones after a death without a court order. It's helpful to save account information with a password manager that has the ability to share them in the event of their death. Also consider access to multi-factor authentication methods.

[Bitwarden.com](https://bitwarden.com)

**Photos and Files:** Your photos and files are an important part of your story. How you want to share these files (if at all) is entirely up to you. Some people upload key photos and files to a service like Google Drive, Dropbox, OneDrive, or Flickr to share them with loved ones.

**Social Media Accounts:** Your social media accounts can share a glimpse into your life, legacy, and what's important to you. You might wish for them to be memorialized, for a loved one to post a final message, or you could want them to be deleted outright. Leave instructions for your loved ones to handle your social media appropriately.

**Digital Assets:** If you have any digital assets worth money (such as gaming accounts or cryptocurrency), share access with someone you trust. It's also good to include information on how to access your accounts, what's worth money, and how to proceed.

## **FUNERAL DETAILS**

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Not all funerals have to be sad, dreary affairs where everyone is dressed in black. If you wish for your family to celebrate you in a different way, make sure to have it written down. This can be related to religious or cultural elements, readings, food or drink, and the dress code. You can also list the type of funeral you would prefer, whether one that's traditional and somber or a celebration of life. This is a chance to leave a final impression on your family.

## **BURIAL, CREMATION, OR DONATION**

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This is one of the most important questions to answer for your loved ones. Would you like a traditional burial, cremation, green burial, or to donate your body to science? There are many burial alternatives out there, so give some thought as to how you'd like to be laid to rest.

[Joincake.com/blog/cremation-vs-burial](https://joincake.com/blog/cremation-vs-burial)

[Pcrm.org/ethical-science/animal-testing-and-alternatives/donate-your-body-to-science](https://pcrm.org/ethical-science/animal-testing-and-alternatives/donate-your-body-to-science)



## **CASKET OR URN?**

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When choosing a burial or cremation, you will want to consider what kind of casket or urn you'd like to be placed in. While you might not choose a specific product, consider different options so your family knows what you prefer. All funeral homes *must accept* a casket or urn that you have purchased yourself, this is federal law. Shop around to find the best price and selection for you and your family.

[Funeralfunds.com/how-to-buy-a-casket](http://Funeralfunds.com/how-to-buy-a-casket)

[Titancasket.com](http://Titancasket.com)

[Thelivingurn.com](http://Thelivingurn.com)

[Agreenerfuneral.org/products](http://Agreenerfuneral.org/products)

[Northwoodscasket.com/casket-hardware/simple-pine-box-casket-kit](http://Northwoodscasket.com/casket-hardware/simple-pine-box-casket-kit)

## **FUNERAL GIFTS/MEMORIAL CONTRIBUTIONS**

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Traditionally, people give flowers as funeral gifts. These are widely known as symbols of life and sympathy, but they might not be what you wish to have at your funeral or memorial service. Instead, you could request gifts to your family, donations to a special cause, or anything else that you find meaningful.

[Everloved.com/articles/memorial-products/guide-buying-funeral-flowers](http://Everloved.com/articles/memorial-products/guide-buying-funeral-flowers)

[Donorsnap.com/blog/nonprofit-memorial-donations-a-complete-guide](http://Donorsnap.com/blog/nonprofit-memorial-donations-a-complete-guide)

## **LOCATION**

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There are many places to hold a funeral, such as a church, funeral home, or somewhere more personal. Depending on how you wish your loved ones to honor you, they can have a funeral at a family home, place of worship, a favorite restaurant, outdoors, or anywhere else that fits their needs and your desires. Your venue of choice also affects the budget. You should also be aware that many funeral homes are religiously affiliated, and due to the nature of the business, many smaller mom-and-pop type firms will typically hold conservative views. Larger funeral businesses can vary from widely spread family operations to corporate run nation-wide firms and tend to be non-denominational as well as more welcoming to “non-traditional” services and families.

[Funerals.org/2014/12/29/how-to-choose-a-funeral-home/](http://Funerals.org/2014/12/29/how-to-choose-a-funeral-home/)

## **PAYMENT ARRANGEMENTS**

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Funerals are surprisingly costly. While it's possible to hold a low-cost, affordable funeral, the burden usually falls on the family to afford these events. You might consider pre-paying for funeral arrangements with a local funeral home. Thinking about the finances behind your funeral in advance saves your family from this financial strain. When pre-paying you have options ranging from burial insurance to setting up a funeral trust. It is important to note that life insurance typically pays very little towards funeral expenses, focusing more on settling final debts such as medical bills. Most funeral homes now offer pre-planning services, shopping around and talking to many different funeral homes can be a great way to get a feel for them and help you select the right one for you and your family. Always remember that you can pre-plan without pre-paying, as you and your loved ones can still benefit from planning ahead.

[Funerals.org/?consumers=should-you-prepay-for-your-funeral](http://Funerals.org/?consumers=should-you-prepay-for-your-funeral)

# ADDITIONAL DEATHCARE ACCESS AND EDUCATIONAL WEBSITES

## **THE ORDER OF THE GOOD DEATH**

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Death is universal and inevitable. Unless you have some secret immortality formula you haven't shared, every one of us will die. We believe our deaths should be supported—financially, emotionally, and culturally—in ways our modern culture and death services often fail to do.

[Orderofthegooddeath.com](http://Orderofthegooddeath.com)

## **EVER LOVED**

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Ever Loved helps you take care of everything in one place. Easily find the best providers, share the details that matter and raise the funds that you need. Easily share an obituary and funeral event. Plus, collect photos, stories and memorial donations from friends and family.

[Everloved.com](http://Everloved.com)

## **FUNERAL CONSUMERS ALLIANCE**

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The goal of Funeral Consumers Alliance is to ensure consumers are fully prepared and protected when planning a funeral for themselves or their loved ones. They do this by offering objective facts about funeral planning so families can plan a meaningful goodbye that fits their needs and their budget.

[Funerals.org](http://Funerals.org)

## **THE FEDERAL TRADE COMMISSION FUNERAL RULE**

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Know your rights under the FTC's Funeral Rule that was built to help consumers make informed decisions during difficult times. The Funeral Rule applies anytime a consumer seeks information from a funeral provider, whether the consumer is asking about pre-need or at-need arrangements.

[Ftc.gov/news-events/topics/truth-advertising/funeral-rule](http://Ftc.gov/news-events/topics/truth-advertising/funeral-rule)

## **GRIEF SHARE**

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Grief Share is a friendly, caring group of people who will walk alongside you through one of life's most difficult experiences. You don't have to go through the grieving process alone.

[Griefshare.org](http://Griefshare.org)

## **TALKDEATH**

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TalkDeath's mission is to encourage positive and constructive conversations around death and dying. From green burials and home funerals, to history, memento mori art, funeral law, and grief resources, TalkDeath.com is the hub for a changing death-conscious public.

[Talkdeath.com](http://Talkdeath.com)

## **EQUAL DEATHCARE:**

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This organization aims to ensure everyone is respected in death, no matter who we are or who we love. We teach marginalized communities how to safeguard loved ones left behind from unsupportive legal next of kin and indifferent funeral professionals. We collect nation-wide resources and connect people to the deathcare services they need. We educate about the funeral process from end-of-life to bereavement aftercare for individuals and families traditionally left behind by mainstream funeral culture.

[EqualDeathcare.org](http://EqualDeathcare.org)

# Appointment of Agent to Control Disposition of Remains

I, \_\_\_\_\_  
(Your name and address)

being of sound mind, willfully and voluntarily make known my desire that, upon my death, the disposition of my remains shall be controlled by

\_\_\_\_\_  
(name of agent)

With respect to that subject only, I hereby appoint such person as my agent with respect to the disposition of my remains.

**SPECIAL DIRECTIONS:**

Set forth below are any special directions limiting the power granted to my agent as well as any instructions or wishes desired to be followed in the disposition of my remains:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Indicate below if you have entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law for funeral merchandise or service in advance of need:

- No, I have not entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law.
- Yes, I have entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law.

\_\_\_\_\_  
(Name of funeral firm with which you entered into a pre-funded pre-need funeral agreement to provide merchandise and/or services)

**AGENT:**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Telephone Number)

SEE OTHER SIDE 

**SUCCESSORS:**

If my agent dies, resigns, or is unable to act, I hereby appoint the following persons (each to act alone and successively, in the order named) to serve as my agent to control the disposition of my remains as authorized by this document:

1. First Successor: \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Telephone Number)

2. Second Successor: \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Telephone Number)

**DURATION:**

This appointment becomes effective upon my death.

**PRIOR APPOINTMENT REVOKED:**

I hereby revoke any prior appointment of any person to control the disposition of my remains.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
(Signature of person making the appointment)

**Statement by witness (must be 18 or older):**

I declare that the person who executed this document is personally known to me and appears to be of sound mind and acting of his or her free will. He or she signed (or asked another to sign for him or her) this document in my presence.

Witness 1: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Address)

Witness 2: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Address)

**ACCEPTANCE AND ASSUMPTION BY AGENT:**

- 1. I have no reason to believe there has been a revocation of this appointment to control disposition of remains.
- 2. I hereby accept this appointment.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
(Signature of Agent)